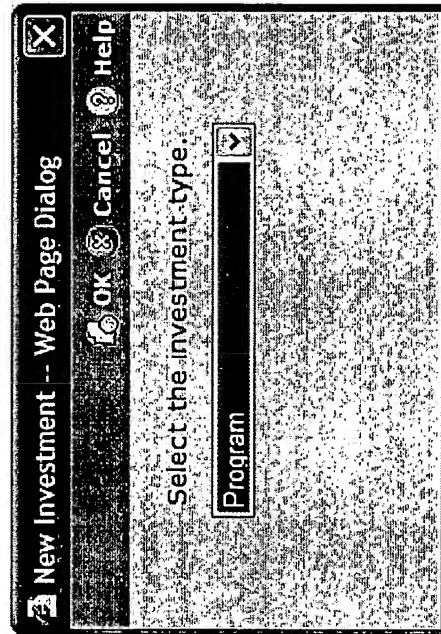
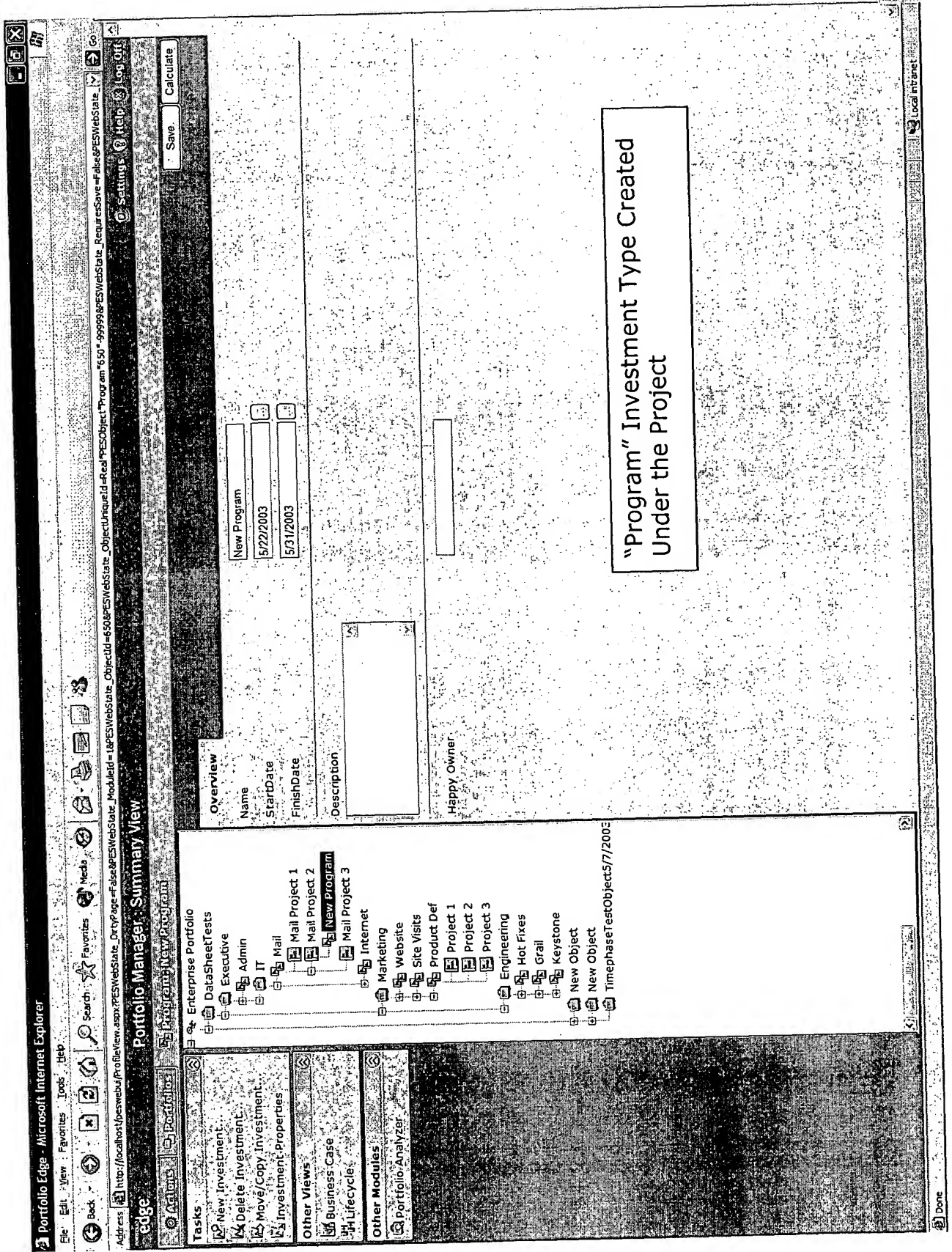


# APPENDIX A



Create "Program" Investment  
Type Under the Project



















Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://localhost/decwebui/lifecycleView.aspx?PESWebSite\_WebSite=118PESWebSite\_ObjectUniqueid=RealPESObjectProject11\*99999PESWebSite\_RequiresSave=FalsePESWebSite\_ViewId=28

Settings Help Log Off

Calculate Save

Dimension Plan Milestone

StartMS

Phase1

Phase2

Completed

5/7/2003

Red

Red

Red

May 2003

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: May 7, 2003

Portfolio Manager Lifecycle View

Project Mail Project 2

Enterprise Portfolio

DashboardTests

Executive

Admin

IT

Mail

Mail Project 1

Mail Project 2

Mail Project 3

Internet

Marketing

Website

Site Visits

Product Def

Project 1

Project 2

Project 3

Engineering

Hot Fixes

Grail

Keystone

New Object

New Object

TimePhaseTestObject5/7/2003

Tasks

New Investment...

Delete Investment...

Move/Copy Investment...

Investment Properties...

Push/Pull Investment

Delay Investment

Extend Investment

Other Views

Summary

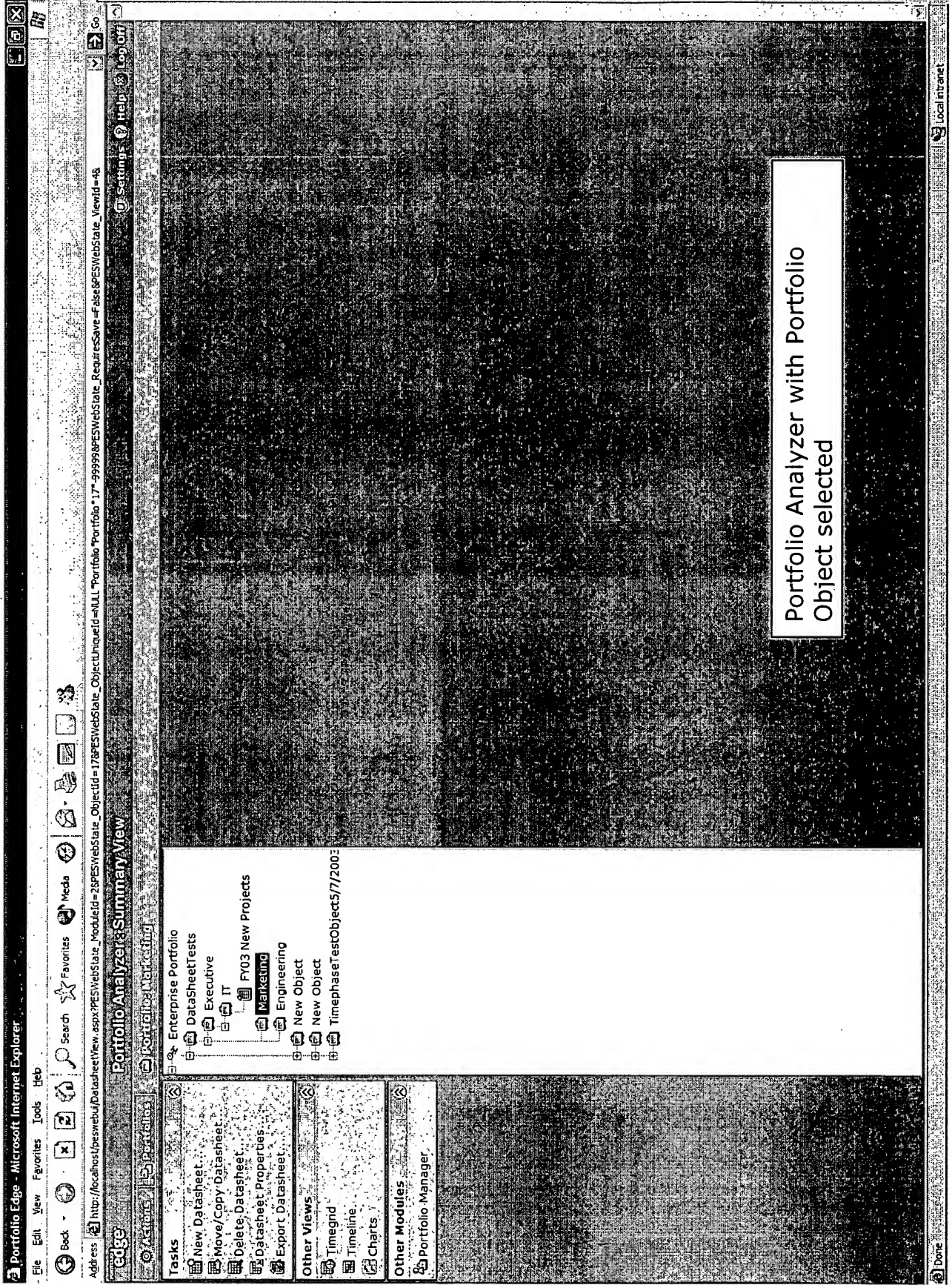
Business Case

Other Modules

Portfolio Analyzer

The lifecycle view allows you to specify dates for milestones







Datasheet Name:

General	Columns	Filters	Group By	Sort By	Time Views	Datasheet Snapshot
---------	---------	---------	----------	---------	------------	--------------------

Description:

Type:

Show Excluded Rows: ☐

Created By

Created Date

Last Modified By

Last Modified Date

Location

Create a new datasheet



✕

New Datasheet -- Web Page Dialog

OK

Cancel

Help

Datasheet Name

Scored Projects by Region

General

Columns

Filters

Group By

Sort By

Time Views

Datasheet Snapshot

Server.Target

Server.Baseline

Server.Actual

Software.Plan

Software.Target

Software.Baseline

Software.Actual

StartDate

StartMS.Plan

StartMS.Target

StartMS.Baseline

StartMS.Actual

State

StateL

StatusL

Strategy

TestDimensioned

TestMinRollupInt

UserEnteredDouble

UserEnteredDoubleRollup

Add

Remove

Selected Columns

Budget

Name

Region

Score

Status

TotalCost

Up

Down

Add some attributes

New Datasheet -- Web Page Dialog

OK

Cancel

Help

Datasheet Name:

General

Columns

Filters

Group By

Sort By

Time Views

Datasheet Snapshot

Filter Rules

TotalCost is greater than 250

Up

Down

Delete

Rule

☒ And ☐ Or

Attribute:

Comparison:

Compare To: ☒ this specific value  
☐ another attribute  
☐ a user entered value

Update

Add

Add a filter to the datasheet...

New Datasheet -- Web Page Dialog

X

OKCancelHelp

Datasheet Name

Scored Projects by Region

GeneralColumnsFilters

Group By

Time Views

Datasheet Snapshot

(ul) Group By:

Region

(ul) Then By:

Score

(ul) Then By:

(ul) Then By:

Specify group by rules ...

New Datasheet -- Web Page Dialog

X

OKCancelHelp

Datasheet Name

Scored Projects by Region

GeneralColumnsFiltersSort ByTime ViewsDatasheet Snapshot

(ul) Sort By: Name

- Ascending
- Descending

(ul) Then By:

- Ascending
- Descending

(ul) Then By:

- Ascending
- Descending

(ul) Then By:

- Ascending
- Descending

And specify a sort ...



Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://localhost:1024/PortfolioAnalyzer/SummaryView.aspx

Portfolio Analyzer: Summary View

Actions

Tasks

Other Views

Other Modules

Enterprise Portfolio

Portfolio Analyzer: Summary View

Portfolio Analyzer: Summary View

Save Calculate

1 of 1

Rows Per Page

All

	Name	Budget	Region	Score	Status	Total Cost
1	Region:2	\$ 81,000.000	2			\$ 72,000.000
2	Score:2	\$ 27,000.000		2		\$ 24,000.000
3	Project 3	\$ 13,000.000	2	2	Green	\$ 12,000.000
4	Site Visit Project 2	\$ 9,000.000	2	2	Red	\$ 8,000.000
5	Website Project 1	\$ 5,000.000	2	2	Green	\$ 4,000.000
6	Score:3	\$ 26,000.000		3		\$ 23,000.000
7	Project 1	\$ 11,000.000	2	3	Yellow	\$ 10,000.000
8	Site Visit Project 1	\$ 8,000.000	2	3	Green	\$ 7,000.000
9	Website Project 3	\$ 7,000.000	2	3	Red	\$ 6,000.000
10	Score:4	\$ 28,000.000		4		\$ 25,000.000
11	Project 2	\$ 12,000.000	2	4	Red	\$ 11,000.000
12	Site Visit Project 3	\$ 10,000.000	2	4	Yellow	\$ 9,000.000
13	Website Project 2	\$ 6,000.000	2	4	Yellow	\$ 5,000.000

Done

New datasheet viewed by default in the Summary view

Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://localhost/decwebu/TimeGridView.aspx?PESWebState\_ModelId=2&PESWebState\_ObjectId=33&PESWebState\_RequiresSave=False&PESWebState\_ViewId=58

Settings Help Log Off

Portfolio Analyzer: Timegrid View

Tasks

- New DataSheet...
- Move/Copy DataSheet...
- Delete DataSheet...
- DataSheet Properties...

Other Views

- Summary
- Timeline
- Charts

Other Modules

- Portfolio Manager

Enterprise Portfolio

- DataSheetTests
- Executive
  - IT
  - Marketing
    - FY03 New Projects
- Scored Projects by Region
  - Engineering
  - New Object
  - New Object
  - TimephaseTestObjects7/2003

Portfolio

- Portfolio Manager

Display: Cashflow Units Currency Dimensions Plan Hide Null Period Calendar Mol

Calculate Save

	5/1/2003	6/1/2003	7/1/2003	8/1/2003	9/1/2003	10/1/2003
1	0	0	0	0	0	0
2	0	0	0	0	0	0
3	0	0	0	0	0	0
4	0	0	0	0	0	0
5	0	0	0	0	0	0
6	0	0	0	0	0	0
7	0	0	0	0	0	0
8	0	0	0	0	0	0
9	0	0	0	0	0	0
10	0	0	0	0	0	0
11	0	0	0	0	0	0
12	0	0	0	0	0	0
13	0	0	0	0	0	0

Switch to Timegrid view ...

Done

Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://localhost:1352/webui/DCChartView.aspx

Portfolio Analyzer: Charts View

Portfolio Datasheet Scored Projects By Region

Tasks

New Datasheet

Move/Copy Datasheet

Delete Datasheet

Datasheet Properties

Add Chart

Other Views

Summary

Timegrid

Timeline

Other Modules

Portfolio Manager

Enterprise Portfolio

DatasheetTests

Executive

IT

FY03 New Projects

Marketing

Scored Projects by Region

Engineering

New Object

TimephaseTestObjects/5/7/2003

By Region

Budget Analysis

Unallocated Budget

Overall Allocated Budget

Move/Copy Remove Properties Run Now

To view a chart, click on an entry from the list of charts appropriate for this datasheet and click the Run Now button

Overall Allocated Budget

Name: Overall Allocated Budget

Description: Chart Description

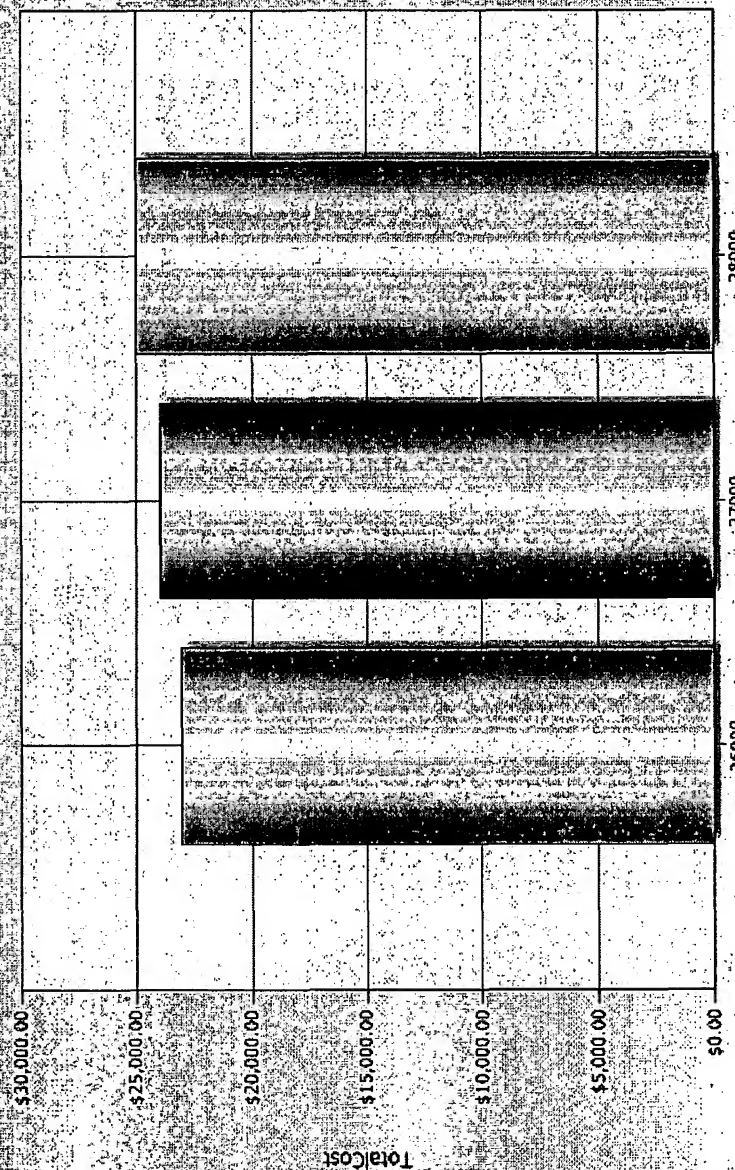
Create four charts for this Datasheet

Done Local Internet



# Overallocated Budget

Score: 2  
Score: 3  
Score: 4



POWERED BY: **pacifedge**

Y AXIS

Budget

X AXIS

TotalCost

History

Live data

Apply

Select Column Chart



Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://localhost/Portfolio/DatasheetView.aspx

Portfolio Analyzer: Summary View

Portfolio Datasheet Scored Projects by Region

Tasks

- New Datasheet...
- Move/Copy Datasheet...
- Delete Datasheet...
- Datasheet Properties...
- Export Datasheet...

Other Views

- Timeline
- Timeline
- Charts

Other Modules

- Portfolio Manager

Enterprise Portfolio

- DatasheetTests
- Executive
  - IT
  - FY03 New Projects
  - Marketing
  - Scored Projects by Region
  - Engineering
- New Object
- New Object
- TimephaseTestObjects/7/2003

Save Calculate

Go

Settings Help Log off

		Name	Budget	Region	Score	Status	TotalCost
1	<input checked="" type="checkbox"/>	Region:2	\$ 81,000.000	2			\$ 72,000.000
2	<input checked="" type="checkbox"/>	Score:2	\$ 27,000.000				\$ 24,000.000
3	<input checked="" type="checkbox"/>	Project 3	\$ 13,000.000	2		Green	\$ 12,000.000
4	<input checked="" type="checkbox"/>	Site Visit Project 2	\$ 9,000.000	2		Red	\$ 8,000.000
5	<input checked="" type="checkbox"/>	Website Project 1	\$ 5,000.000	2		Green	\$ 4,000.000
6	<input checked="" type="checkbox"/>	Score:3	\$ 26,000.000				\$ 23,000.000
7	<input checked="" type="checkbox"/>	Project 1	\$ 11,000.000	2		Yellow	\$ 10,000.000
8	<input checked="" type="checkbox"/>	Site Visit Project 1	\$ 8,000.000	2		Green	\$ 7,000.000
9	<input checked="" type="checkbox"/>	Website Project 3	\$ 7,000.000	2		Red	\$ 6,000.000
10	<input checked="" type="checkbox"/>	Score:4	\$ 28,000.000				\$ 25,000.000
11	<input checked="" type="checkbox"/>	Project 2	\$ 12,000.000	2		Red	\$ 11,000.000
12	<input checked="" type="checkbox"/>	Site Visit Project 3	\$ 10,000.000	2		Yellow	\$ 9,000.000
13	<input checked="" type="checkbox"/>	Website Project 2	\$ 6,000.000	2		Yellow	\$ 5,000.000

Copy the datasheet to another portfolio object

Done Local intranet



Portfolio Edge - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address: http://localhost/pseweb/DataSheetView.aspx

Portfolio Analyzer - Summary View

Actions Portfolios

Tasks

- New Datasheet...
- Move/Copy Datasheet...
- Delete Datasheet...
- Datasheet Properties...
- Export Datasheet...

Other Views

- Timegrid
- Timeline
- Charts

Other Modules

- Portfolio Manager

Enterprise Portfolio

- DataSheetTests
  - Executive
    - FY03 New Projects
    - Marketing
      - Scored Projects by Region
      - Engineering
        - Scored Projects by Region
        - New Object
        - New Object
        - TimephaseTestObject5/7/2003

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28

Region:1

Score:3

Admin Project 1

Admin Project 3

Score:4

Admin Project 2

Region:2

Score:2

Project 3

Site Visit Project 2

Website Project 1

Score:3

Project 1

Site Visit Project 1

Website Project 3

Score:4

Project 2

Site Visit Project 3

Website Project 2

Region:3

Score:2

Bug fix project 1

Score:3

Bug fix project 2

Sprint 1

Stage 1

Stage 3

Score:4

1

2

3

4

5

6

7

8

9

10

11

12

13

14

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27

28

Region

Score

Status

TotalCost

\$ 36,000.000

\$ 24,000.000

\$ 11,000.000

\$ 13,000.000

\$ 12,000.000

\$ 12,000.000

\$ 81,000.000

\$ 27,000.000

\$ 13,000.000

\$ 9,000.000

\$ 5,000.000

\$ 26,000.000

\$ 11,000.000

\$ 8,000.000

\$ 7,000.000

\$ 28,000.000

\$ 12,000.000

\$ 10,000.000

\$ 6,000.000

\$ 535,000.000

\$ 40,000.000

\$ 40,000.000

\$ 225,000.000

\$ 50,000.000

\$ 70,000.000

\$ 45,000.000

\$ 60,000.000

\$ 190,000.000

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\$ 20,000.000

\$ 9,000.000

\$ 11,000.000

\$ 10,000.000

\$ 10,000.000

\$ 72,000.000

\$ 24,000.000

\$ 12,000.000

\$ 8,000.000

\$ 4,000.000

\$ 23,000.000

\$ 10,000.000

\$ 7,000.000

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\$ 70,000.000

\$ 50,000.000

\$ 60,000.000

\$ 10n nnn nnn

Save Calculate

Done Local intranet

Datasheet copied